Annual Business Officers' Conference

Renaissance Orlando Airport Hotel, Orlando
May 5-7, 2019

#FCISBOConf19

SUNDAY, MAY 5

6:00-6:30PM
Milan Foyer

Welcome Reception

6:30-8:30PM
Milan CD

Dinner and Opening Remarks with Dr. Barbara Hodges,
Executive Director, FCIS

MONDAY, MAY 6

7:30-8:30AM
Fresco

Breakfast
Please note: Breakfast is available at the hotel but is not included in the registration cost for the conference. For those staying at the hotel, the hotel rate includes one hot breakfast voucher per night.

8:30AM
Normandy B

Welcome and Introduction

8:40-9:55AM
Normandy B

Keynote: *Perspectives and Insights for Navigating Financial Trends*

The work of independent school leaders is rewarding and challenging. We are all experiencing changes in the environment quickly and relentlessly. It requires leaders to understand these trends and collaborate with other school leaders to create and sustain enduring success. This keynote will explore the top trends facing independent school business officers and facilitate a discussion for addressing them and leading your school to future financial success.

Presenter: Jeff Shields, FASAE, CAE, President and CEO, National Business Officers' Association (NBOA)

10:00-10:30AM
Normandy Foyer

Break I Visit the Exhibitors

10:30-11:30AM
Normandy A

Breakout 1a: *What Risks Should We Be Talking About?*

Risk management is an intentional approach to identifying, evaluating, and planning for risks that will likely affect your school. Finances, operations, and even your mission is at stake. Risks confronting independent schools are changing rapidly and continue to grow in complexity. How can school leadership decide which risks require attention, and who should focus on them? Informed by survey responses from nearly 250 independent school administrators about reputation and other risks that "keep you up at night," this session will identify those risks that the prudent business officer should plan for in the current environment. The session will also provide advice on key considerations for managing those risks, which the business officer can use to jump start campus conversations.

Presenter: Constance Neary, J.D., Vice President for Risk Management, United Educators

10:30-11:30AM
Normandy B

Breakout 1b: *Managing Staff: Top Five Claims Brought Against Independent Schools*

Although there are some employment law issues that independent schools are likely to encounter on a yearly basis, such as FMLA, there are also timely and unique issues that are on the legal cusp and will certainly be encountered, such as transgender issues and unique mental health issues. It is imperative that the school leaders have an understanding of how to address such issues from a legal perspective. This session will explore five of the most difficult issues likely to be encountered during the 2018/2019 school year and will provide an action plan for dealing with each of those issues.

Presenter: Suzanne Bogdan, Partner, Fisher & Phillips LLP

11:45AM-12:45PM
Normandy A

Breakout 2a: *Perils & Pitfalls of Catastrophic Property Insurance*

In this session, Darrow and Rep will review what to do when a catastrophe occurs and share best practices for pre-event planning goals and for post-event recovery. Participants will discuss how coverage works following a catastrophic loss, what an insurance carrier expects a school to provide them following a loss, what catastrophic property underwriters look for and how to impress them, and how coverage is rated and priced. Participants will learn what insurance protection is needed to make sure their school can recover after a catastrophe.

Presenters: Darrow Milgrim, CIC, AAI, CSRM, National Director, Independent Schools K12 Education Practice and Camp Programs, Arthur J. Gallagher & Co.; and Rep Plasencia, Senior Vice President, Risk Placement Services (RPS)

11:45AM-12:45PM
Normandy B

Breakout 2b: *Fringe Benefits: To Tax or Not To Tax*

Fringe benefits make an appearance in many of our schools. They may be part of a compensation package for a Head of School, pieces of the recruitment and relocation process for new faculty, or something as simple as a gift card given to an employee for recognition or appreciation. Once a decision to provide a fringe benefit has been made, proper reporting and taxation of the benefit is critical. During this panel discussion, we will explore fringe benefits commonly found in schools and discuss the proper treatment of them from both a legal and tax accounting standpoint. We want to protect our schools and our employees from unnecessary penalties and potential audits!

Presenters: Beth Zamerski, Associate Head of School for Finance and Operations, Saint Edward's School; Suzanne Bogdan, Regional Managing Partner, Fisher & Phillips LLP; Deborah A. Crum, CPA, Tax Principal, Rehmann

11:45AM-12:45PM **Gathering for Directors of Auxiliary Programs**

12:45-1:30PM
Lobby

Lunch

1:45-2:45PM
Normandy A

Breakout 3a: *21st Century Trends in Independent Schools*

INDEX is a member-driven not-for-profit organization which collects, analyzes, and benchmarks institutional and programmatic performance data among Independent Schools across the US. In this session, we will examine trends in INDEX schools' performance metrics to better understand how schools have adapted to and transformed as a result of the changing economic and demographic forces of the 21st century.

Presenter: Lisa Mason Pullman, Executive Director, INDEX

1:45-2:45PM
Normandy B

Breakout 3b: *Changing Financial Aid Focus from Student Headcount to NTR*

As financial aid is becoming a larger and larger portion of school budgets, and thus a larger and larger component of student recruitment and retention, schools need to change their budget focus and Admissions goal setting from student headcount to Net Tuition Revenue (NTR). Participants will receive and review templates that allow a school to annually monitor and track their NTR, NTR per student, and NTR per grade. The session will also identify important financial aid metrics schools should be tracking and monitoring year by year, with recommendations on how to identify and slow down or turn around negative trends.

Presenter: Palmer Ball, Palmer Ball Consulting, LLC

2:45-3:10PM
Normandy Foyer

Break I Visit the Exhibitors

3:10-4:00PM
Normandy B

The Business Officer's Role in Leading and Maintaining Accreditation

Why is accreditation valuable to an independent school? What is accreditation's role in long term school sustainability? How involved should the chief business officer be in leading and maintaining accreditation? This session will look at these questions and more, demonstrating the importance of accreditation as a facilitator of best practices in promoting the health and therefore sustainability of an independent school.

Presenter: Dr. Barbara Hodges, Executive Director, FCIS

4:15-5:00PM
Normandy B

Cracker Barrel for Business Officers

4:15-5:00PM
Normandy A

Cracker Barrel for Directors of Auxiliary Programs

6:30PM

Dinner Offsite

TUESDAY, MAY 7

8:00-9:00AM
Fresco

Breakfast

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9:15-10:15AM
Normandy A

Breakout 4a: *The Wow Factor of Luxury Service*

In this session, Bill will define what high-level customer service looks like, sounds like, and even feels like. He will demonstrate a method to create practical, sustainable Service Standards and will share best practices for how to get "buy-in" from staff to consistently deliver high-level service. Participants will discuss how to monitor service performance and look at ways to keep the service culture alive and well in day to day operations.

Presenter: Bill David, CHT, Director of Training & Development, Gate Hospitality Group

9:15-10:15AM
Normandy B

Breakout 4b: *Mind the Gap with Strong Auxiliary Programs*

A talented panel comprised of Auxiliary Program Directors and CFO's will share their journey on designing and developing strong Auxiliary Programs. The forum will be open to questions, and the panel will discuss program design, staffing, pricing models, budgeting and administrative systems.

Moderator: Nancy Greene, Vice President of Finance and Operations/CFO, Pine Crest School
Panelists: Jana Blackwell, Executive Director of Auxiliary Programs, Pine Crest School; Robert Lundgren, CFO/COO, Westminster Christian School; Brette Rothfield, Business Manager, Alexander Montessori School; Drew Upchurch, Director of Auxiliary Programs, The Bolles School

10:15-10:30AM
Normandy Foyer

Break

10:30-12:00PM
Normandy B

Keynote I *Re-imagining Independent Schools: An Innovator's Journey*

Re-imagining Independent Schools: An Innovator's Journey Uncertainty is our new narrative, driven by disruptors that challenge an often familiar and comfortable status quo. But flux offers independent schools enormous opportunities to innovate, reimagine, and fully realize their missions. In this session, Tim Fish will look at what needs to be in place for whole school innovation to succeed. Small group discussion will equip participants with new capabilities to help build a future-wise school.

Presenter: Tim Fish, Chief Innovation Officer, National Association of Independent Schools (NAIS)

12:00PM

Departure

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